

# zipLogix Digital Ink® Agent User Guide



eSign tools built in to zipForm® make it easy to create professional, accurate signing packets for any real estate transaction file. Send forms for click-to-sign signatures without the hassle of new tabs, windows, or pop-ups. With a fully integrated digital signing experience, it is easier than ever to get to the closing table.

zipForm Plus

TRANSACTIONS | TEMPLATES | CONTACTS | HELP | FEEDBACK

Signix Test - RLA

1 Select Forms >> 2 Select Parties >> 3 Add Signatures

Party List: Mister Seller | Document List: Residential Listing Agreement - Exclusiv...

Send | Save | Quit

### RESIDENTIAL LISTING AGREEMENT

Mister Seller ("Seller")  
Best Realty, Inc. ("Broker")  
and ending at 11:59 P.M. on (date) \_\_\_\_\_ ("Listing Period")  
right to sell or exchange the real property in the City of Los Angeles,  
Los Angeles, Assessor's Parcel No. \_\_\_\_\_,  
1 Listing St ("Property").

**EXCLUDED:** Unless otherwise specified in a real estate purchase agreement, all fixtures and fittings that included, and personal property items are excluded, from the purchase price.

**INCLUDED:** \_\_\_\_\_

**ADDITIONAL ITEMS INCLUDED:** \_\_\_\_\_  
Seller intends that the above items be excluded or included in offering the Property for sale, but understands that: (i) the purchase and will ultimately determine which items are excluded and included in the purchase and (ii) the Seller does not warrant that the above exclusions and/or inclusions will be in the purchase

zipLogix Digital Ink® Integration

Full zipLogix Digital Ink® integration with zipForm® allows zipLogix Digital Ink® users to:

- Set up the signature packet, including documents, signers and signature tags, in three easy steps, without leaving zipForm®
- Send for signing from zipForm® Plus, zipForm® Mobile Web Edition, or zipForm® 6 Standard
- Name signature submissions so that the signature packet is easy to identify in the future
- View the status of packets sent to zipLogix Digital Ink® and update signatures packets from within zipForm® Plus
- Review submission records for signatures of individual documents
- Automatically fills signer contact information directly from the Parties tab
- Save or print a complete history of the signature progress, including emails sent to signers
- (zipVault® subscribers) Automatically receive a folder of signed PDF documents stored in the zipForm® Plus file when signing has been completed by all parties

Back | Fullscreen | Save | Email | Print | Transaction Info | Fastfill | Save as PDF | Highlight | Strikeout

Sign this form  
Sign multiple forms  
View Submissions

### Lead-Based Paint: Disclosure

1 **Disclose Address:**  
2 123 Signa Way, Springfield, ST 12345  
3  
4 **Lead Warning Statement:** Every Buyer of any interest in residential real property on which a residential dwelling was built prior to 1978 is notified that such property may present exposure to lead from lead-based paint that may place young children at risk of developing lead poisoning. Lead poisoning in young children may produce permanent neurological damage, including learning disabilities, reduced intelligence quotient, behavioral problems, and impaired memory. Lead poisoning also poses a particular risk to pregnant women. The Seller of any interest in residential real property is required to provide the Buyer with any information on lead-based paint hazards from risk assessments or inspections in the Seller's possession and notify the Buyer of any known lead-based paint hazards. A risk assessment or inspection for possible lead-based paint hazards is recommended prior to



# zipLogix Digital Ink® Agent User Guide

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# Welcome

Digital signatures revolutionize the signing experience. They offer you a truly paperless electronic process that can be trusted. You can now sign your documents without having to print, fax or ship documents. You and your clients can complete the signing process safely and securely without waiting.



Benefits of using digital signatures include:

- Secure and verifiable signatures
- Faster and easier to sign
- Better protection of confidential information
- Fewer mistakes requiring corrections and additional work
- Digital signatures permanently secure the document's content and signer identity
- Incorporate PDF forms and documents for a complete signing packet
- zipForm® forms are automatically set up with areas for signers to click-to-sign already in place
- More convenient – no printing, faxing, driving, or waiting for couriers
- Instant delivery of PDF documents once signing is complete through the CC feature
- Secure identity verification available through independent third-party identification

Complete your forms in zipForm®, click eSign, and send a professional packet of documents to any signer. Signers receive an email with a link to click on in order to start the secure signing process. They can create their signature, click to sign and initial documents, and, when signing is complete, their signatures are sealed into the document. Signed documents automatically continue to specified signers, and are delivered to your zipForm® file with the zipVault® feature once documents are executed.

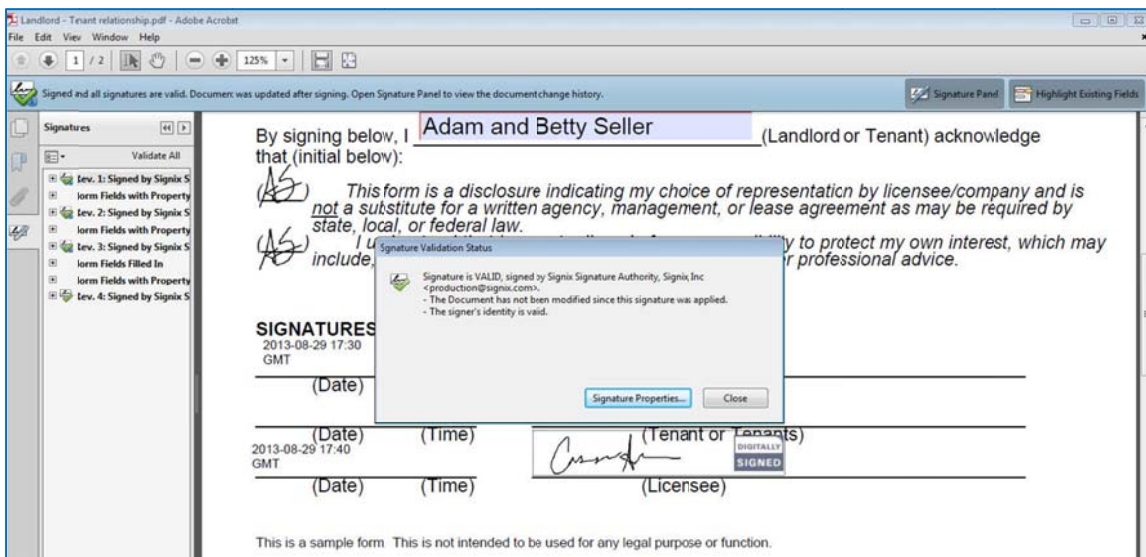


Figure 1 – Signature validation shows this document and signature are original and valid

Agents can customize signing packets by adding PDFs; adding areas for people to sign, initial, date, and fill in text or check boxes; and utilizing tools like the CC list, to automatically deliver signed documents, or the Verify ID options, to independently confirm a signer's identity.

Tools, including signing guides, white papers, and how-to videos, are also available for agents to help signers understand digital signatures and answer questions about signature security are available from [www.ziplogix.com/digitalink](http://www.ziplogix.com/digitalink).

# Getting Started with zipLogix Digital Ink®

zipLogix Digital Ink® can be used to send documents for signing from zipForm® Plus (Online forms software), zipForm® 6 Professional (Desktop forms software), or the zipForm® Mobile Web Edition (phone or tablet forms software).

## Enable zipLogix Digital Ink® as your eSign tool in zipForm® Plus

To enable zipLogix Digital Ink® within zipForm® Plus and zipForm® Mobile Web Edition, sign in to your zipForm® Plus account and open your zipForm® Plus **Profile**. You can sign in through any computer by visiting [www.zipformplus.com](http://www.zipformplus.com), or sign in through your association or brokerage website.

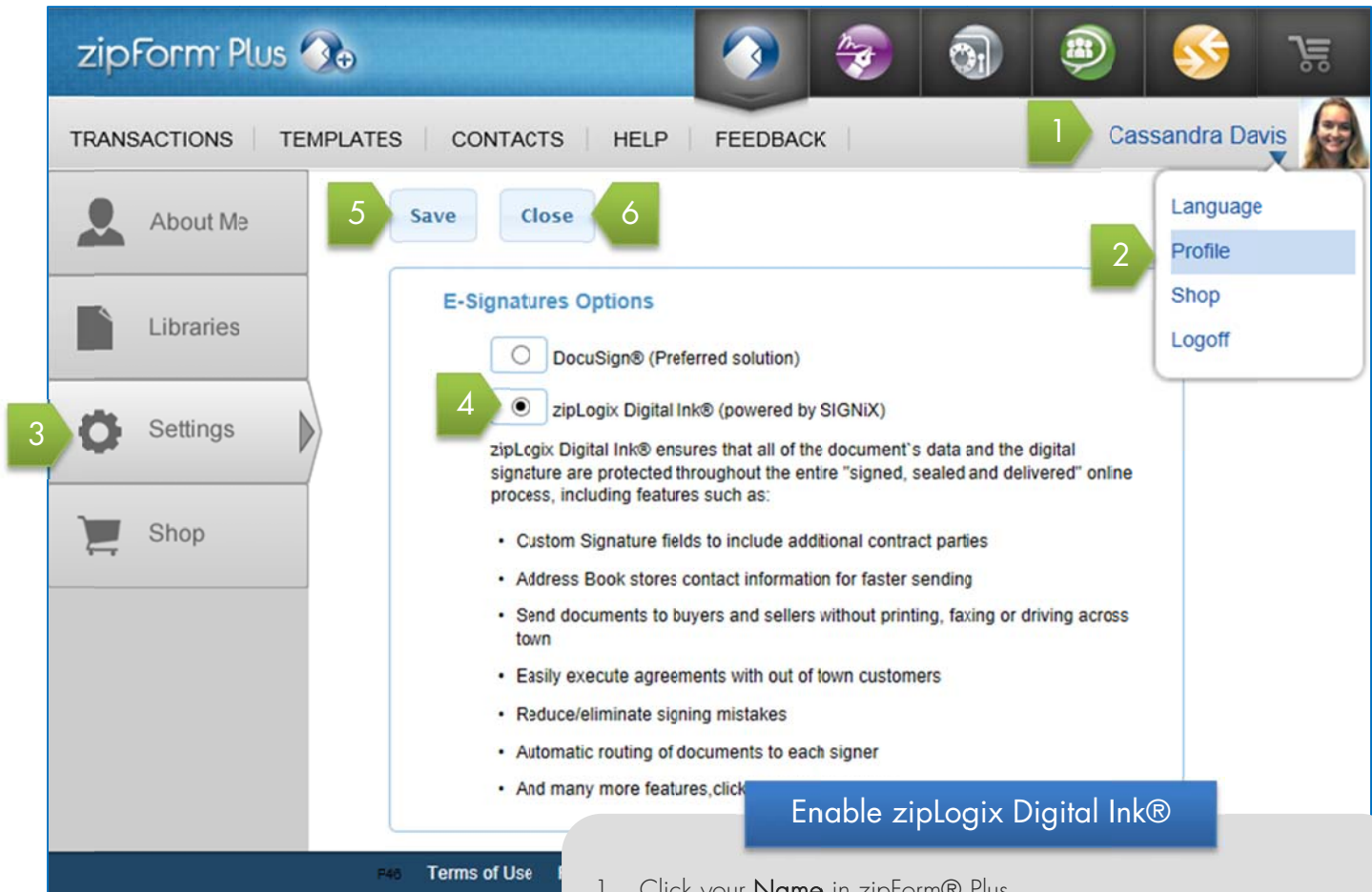


Figure 2 - Enable ziplogix Digital Ink®

Once your preferences are saved, your eSign button in zipForm® Plus will allow you to send forms and PDF documents for signing through zipLogix Digital Ink® directly from zipForm® Plus. These changes will be saved as part of your account settings, and will not change unless you change your settings again.

1. Click your **Name** in zipForm® Plus
2. Click the **Profile** button
3. Click **Settings**
4. Click the selection button for **ziplogix Digital Ink®**
  - a. If necessary, add signing credits using the **Add Credits** button. Signing credits cover as many sets of documents sent for signatures as you need for one file (the same buyer, seller, agents and property address)
  - b. Signing credits are not necessary in areas with unlimited zipLogix Digital Ink® signatures as a member benefit, or for agents who have purchased an unlimited signing subscription for \$99 per year.
5. **Save** your changes
6. Click **Close** to return to zipForm® Plus

# Setting up documents for digital signatures

zipForm® contracts that are sent for signatures from zipForm® Plus, zipForm® Mobile Web Edition, or zipForm® 6 Standard are automatically set up with mandatory signature and initials highlighted. Some forms which must be filled out by the signer may also be automatically set up for signing.

As the agent, you can select the forms that are going to be signed, add PDF documents to complete the signature packet, and set up where signers will click to sign, initial, fill in text or check off check boxes.

**Note:** In zipLogix Digital Ink®, signers only see the forms and documents that they are assigned to sign or initial. You can add the Acknowledge/Agree task or the Read task to the form or document if you would like a signer to see a document without signing or initialing.

## Sending forms and PDFs to be signed from zipForm® Plus

1. Open a zipForm® transaction file in zipForm® Plus
2. Add and complete the forms from the **All Forms** tab that you wish to have signed, and add PDFs using the **Add Document** button, if necessary.

*Tip: Fill out signer information on the **Cover Sheet** form or the **Parties** tab to save names and email addresses, auto-fill corresponding forms, and set up the list of signers before sending for signatures.*

3. Click the **eSign** button on the File menu tab, and click the **Sign** option.

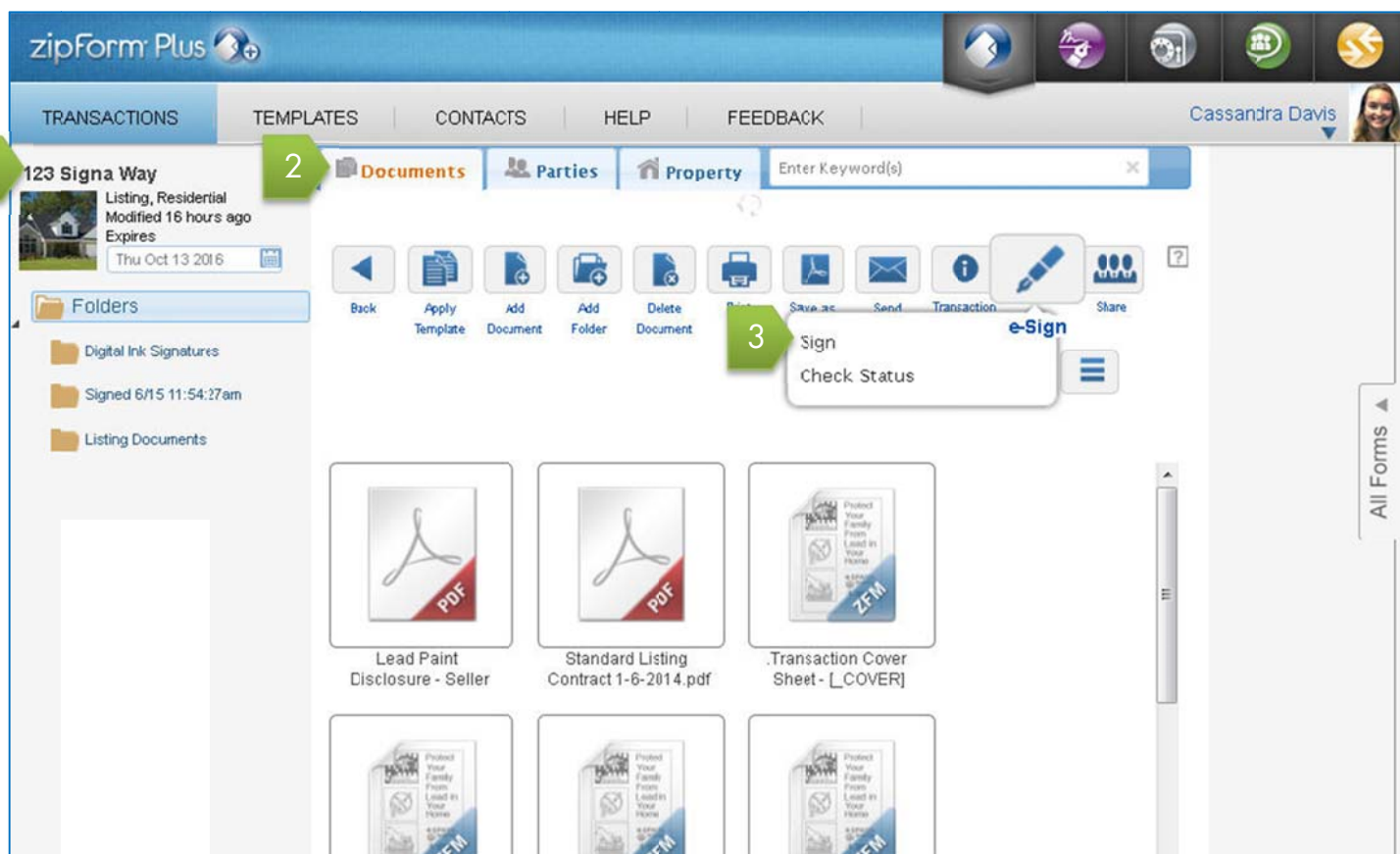


Figure 3 - Click eSign to start putting together a packet of documents to be signed

## Step One: Select documents to be signed

4. Click the check box on the form or document to **select the forms and PDFs** that you would like to send for signing.  
Selected zipForm® forms will automatically have key signature areas marked for signing in zipLogix Digital Ink®.
5. (Optional) Click **Browse** to add a PDF from your computer to the signing packet
6. Click **Next**

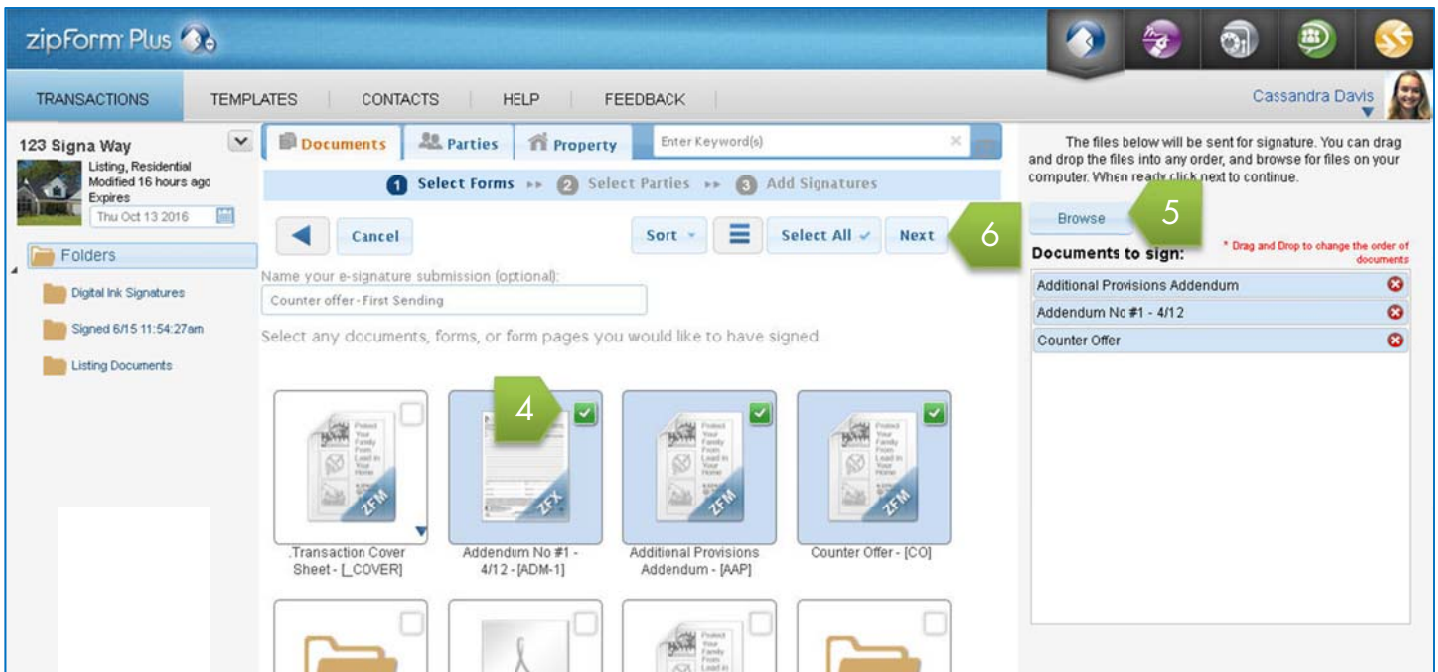


Figure 4 - Select documents (Forms and PDFs) to be signed

## Step Two: Select signers

7. Click the check box next to a signer to select the signers, then click **Done**  
*Tip: Click and type to fill in or change a signer's name or email address while selecting the signers*

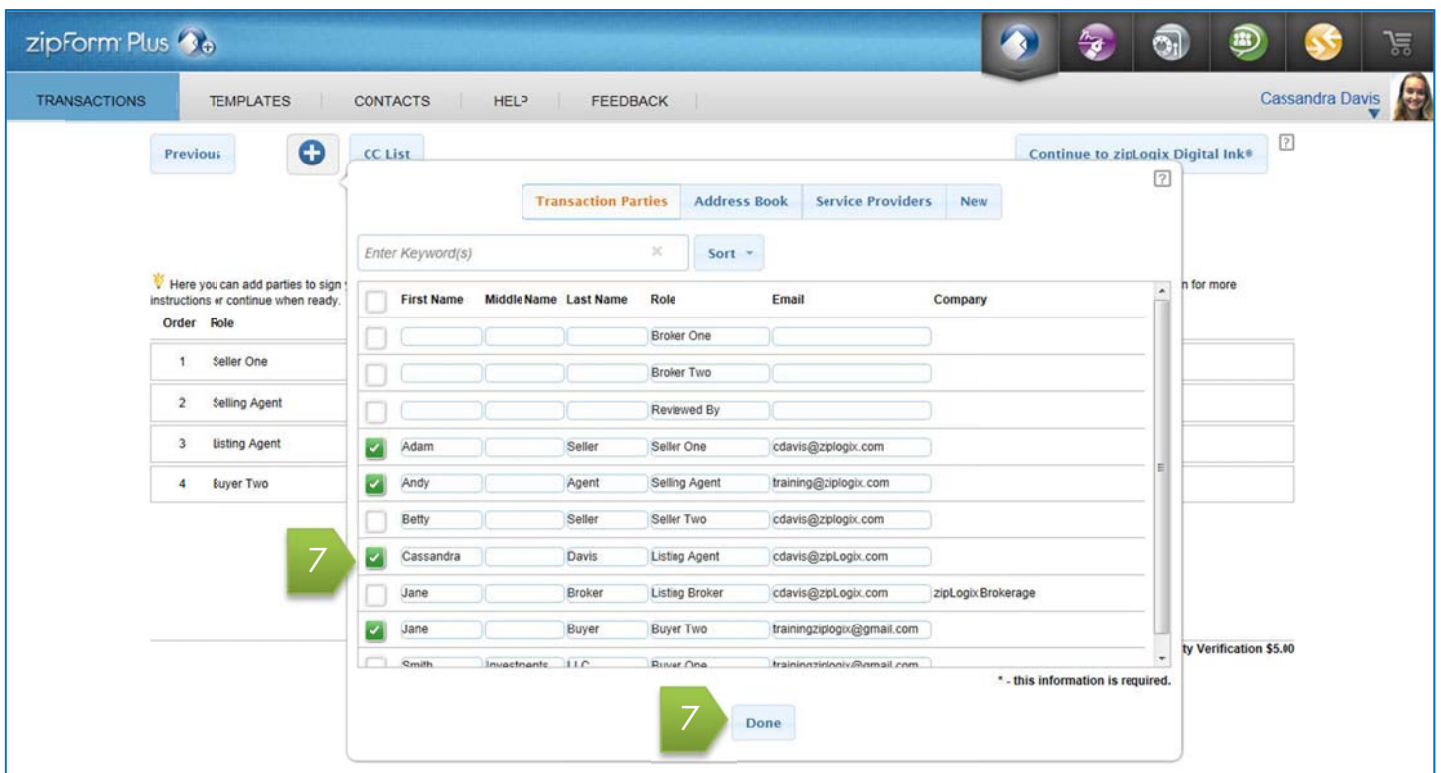


Figure 5 - Select Signers from the Transaction Parties

## Step Two (continued): Signer Options

8. Drag and drop to arrange signing order. Drag one signer on top of the other to provide both signers with the option to sign at the same time.
9. (Optional) Check the **CC List** box if you would like zipLogix Digital Ink® to automatically deliver an email with the final executed documents attached as a PDF once all signers have finished signing
10. (Optional) Check the **Verify ID** box if you would like to confirm a signer's identity using independent third party identity verification. The identity verification asks the signer a series of questions to securely verify their identity before the signer is able to proceed with signing. Identity verification costs \$5 per verification.
11. Click **Next** to continue

Order	Role	Name	Email	CC	Verify ID (\$)
1	Selling Agent	Andy Agent	training@ziplogix.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2	Buyer Two	Jane Buyer	trainingziplogix@gmail.com	<input type="checkbox"/>	<input type="checkbox"/>
3	Listing Agent	Cassandra Davis	cdavis@zipLogix.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Figure 6 – Setting custom options for signing parties

## Step Three: Add Signatures

12. Click and drag signing tasks (areas where signers will click to sign or initial) from the tools panel to the contract.
13. (Optional) Click and drag to add text or check boxes once a signer is assigned to sign or initial the contract.

EXECUTED the \_\_\_\_\_ day of \_\_\_\_\_ (BROKER: FILL IN THE DATE OF FINAL ACCEPTANCE.)

Signature Preview: Jane Buyer

Tools Panel: Signature, Initial, Text Box, Check Box, Ack/Agree, Read

Figure 7 – Adding signing tasks to the contracts

Step Three (Continued): Signature task options and document review

- 14. (Optional) Click and drag **Ack/Agree** or **Read** tasks to the page for signers without signing tasks
- 15. Use the **Document List** drop-down to review all documents in the packet and ensure each document and each signer has at least one signing task assigned to it
- 16. Click the **wrench icon** above a signing task in order to edit options, including whether signatures are optional or mandatory
- 17. Click **Send**

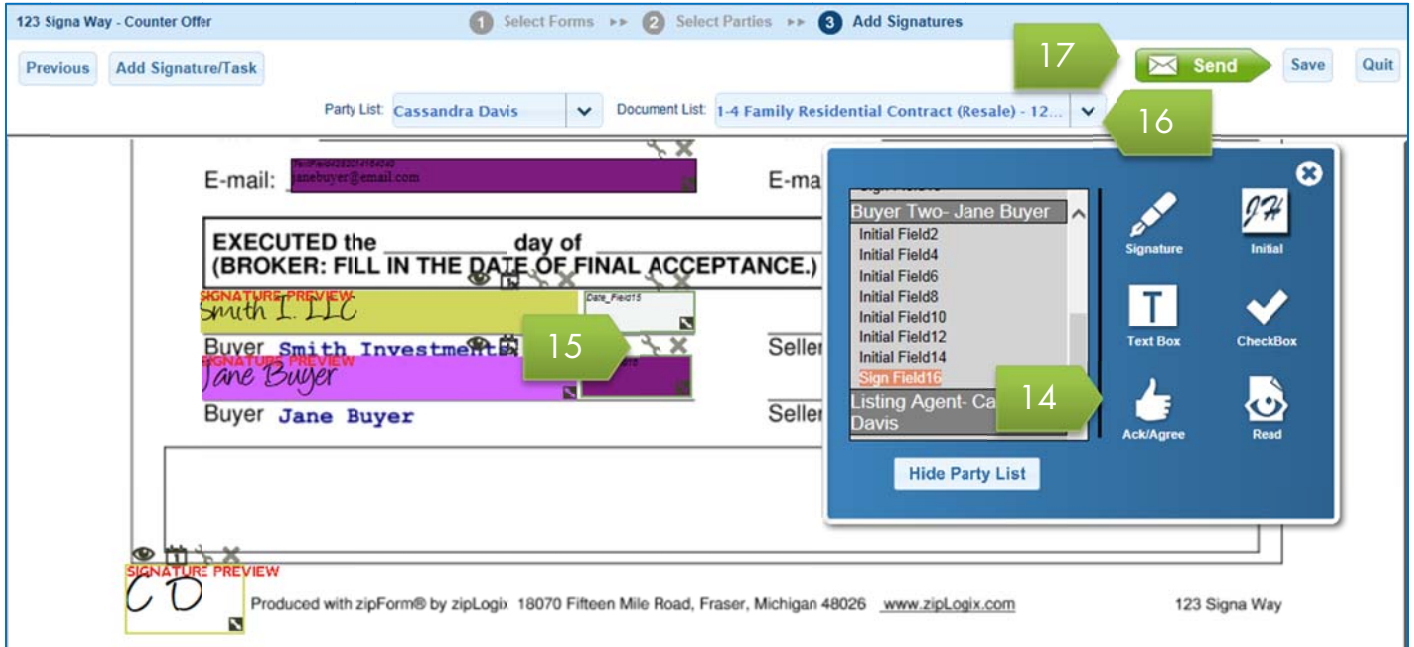


Figure 8 – Signature task options and document review

- 18. Click and type to edit the text and customize the email message sent to all signers
- 19. Click **Send Now**

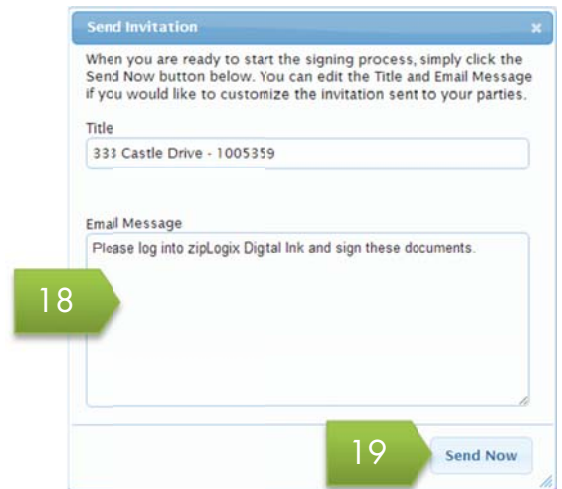


Figure 9 – Customize the invitation to start signing

- 20. You will be brought to the signature packet's status page. Click **Close** to return to zipForm® Plus.

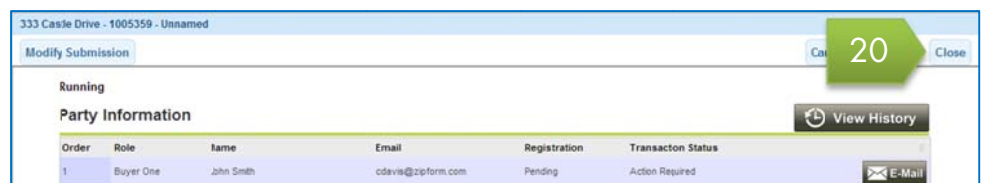


Figure 10 – Signature packet status page



# Check Status

The Check Status feature allows you to edit or review the status of documents that are in the process of being signed by one or more signers. If signing is not yet complete, documents that are in the process of being signed can be reviewed using the **Check Status** feature, located under the e-Sign button inside of the zipForm® Plus file.

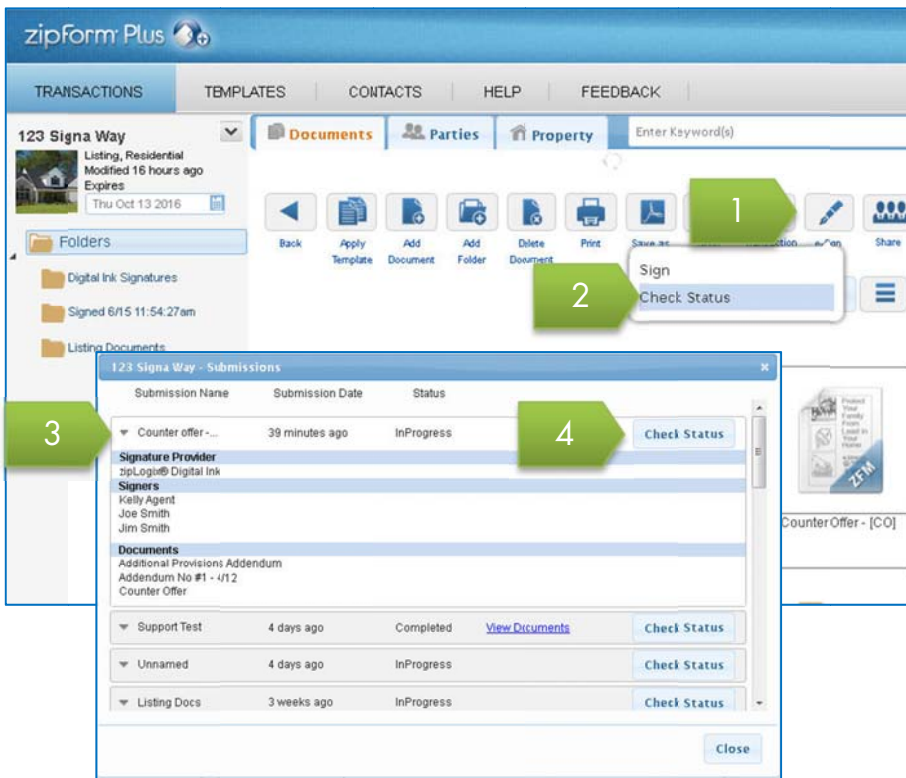


Figure 12 – Check status of signatures

## Check Status

1. Click **eSign** inside a zipForm® Plus transaction
2. Click **Check Status**
3. Click a **Submission Name** to see the list of documents sent for signing on that date
4. Click **Check Status** to open the zipLogix Digital Ink® Status
5. Click **E-Mail** to email a signer
6. Click **View History** to view or print the signing history
7. Click **Download All** to download all files
8. Click **Modify Submission** to make changes
9. Click **Cancel Submission** to cancel this signing package
10. Click **Close** to return to zipForm® Plus

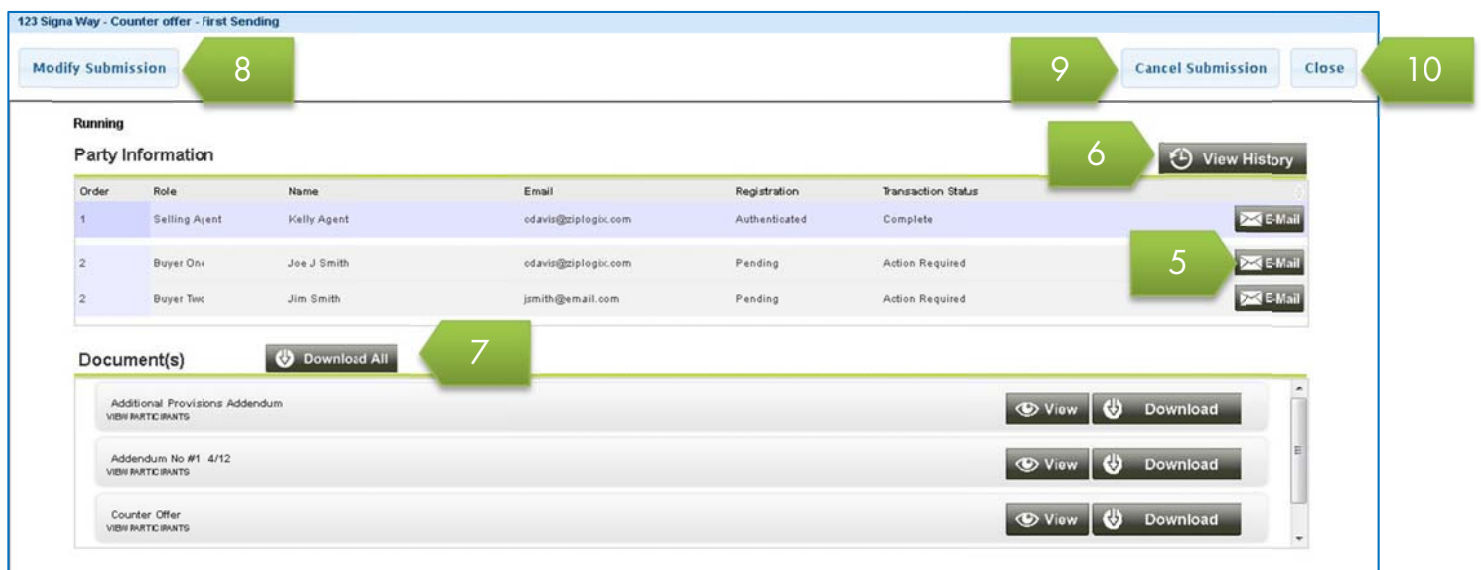


Figure 11 – zipLogix Digital Ink® Check Status page

# Sending PDFs to be signed without forms from zipForm® Plus

You do not have to create a transaction inside of zipForm® Plus in order to send documents for signing. Use the **Create Digital Ink** button on the TRANSACTIONS page of zipForm® Plus to send a PDF file for signing without going through a zipForm® Plus transaction.

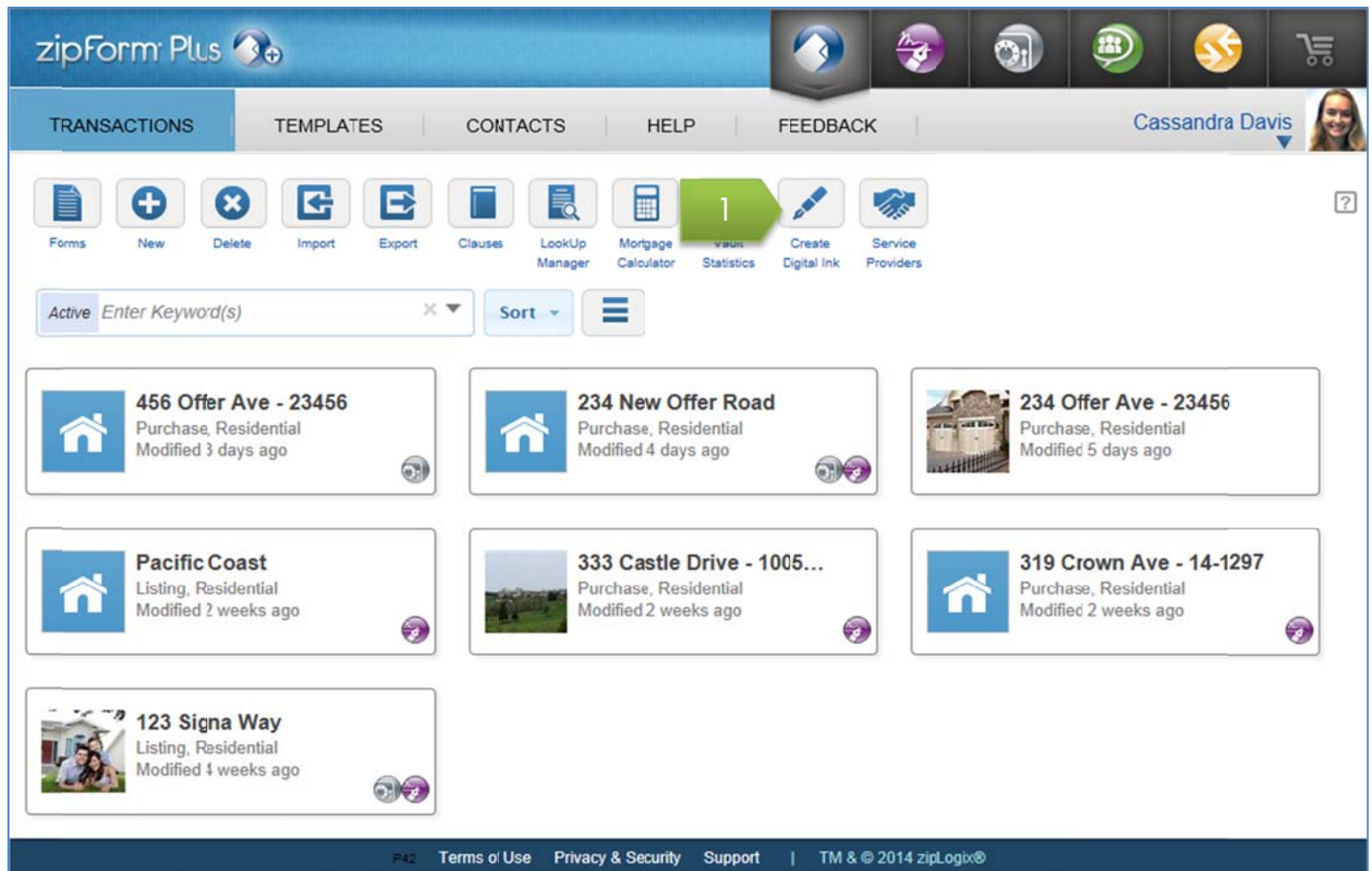


Figure 13 – Click *Create Digital Ink* to send a document for documents for signatures without using a zipForm® Plus transaction

## Send for signing without forms

1. Click Create Digital Ink button
2. Enter a **Name** for this set of documents that you are preparing for signatures
3. Click Create

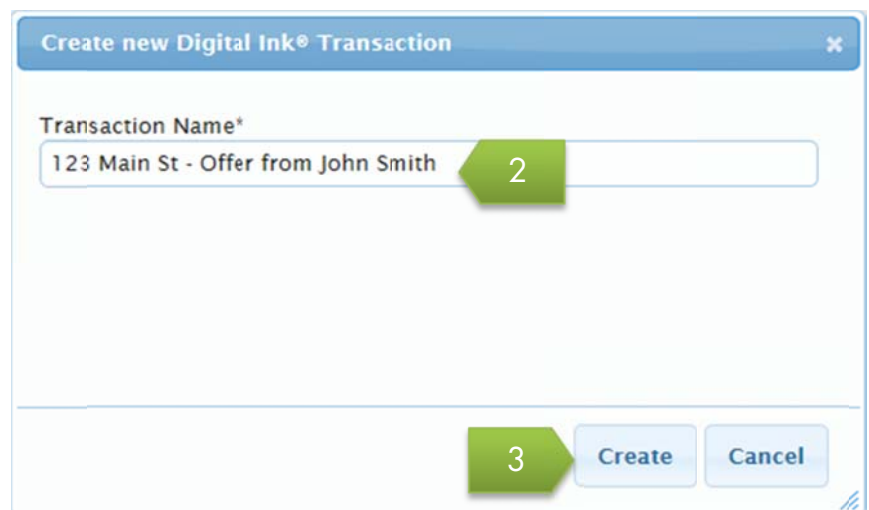
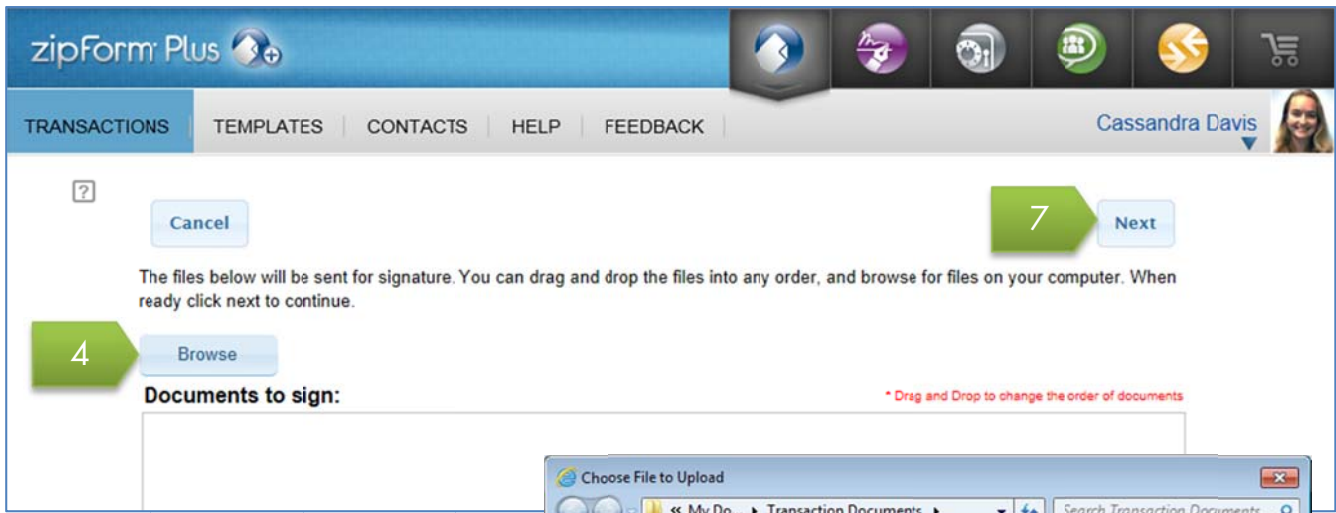


Figure 14 – Name the ziplogix Digital Ink® file



### Add documents

7. After starting the zipLogix Digital Ink® file, click **Browse**
8. Select the **PDF file** from your computer that you would like to prepare for signatures
9. Click **Open**  
*Tip: Click Browse again to continue to add documents, as needed*
10. Click **Next**

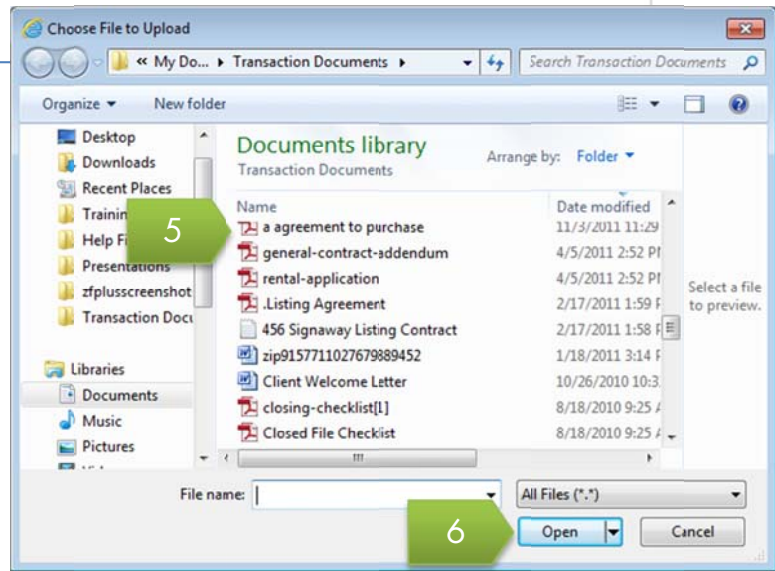
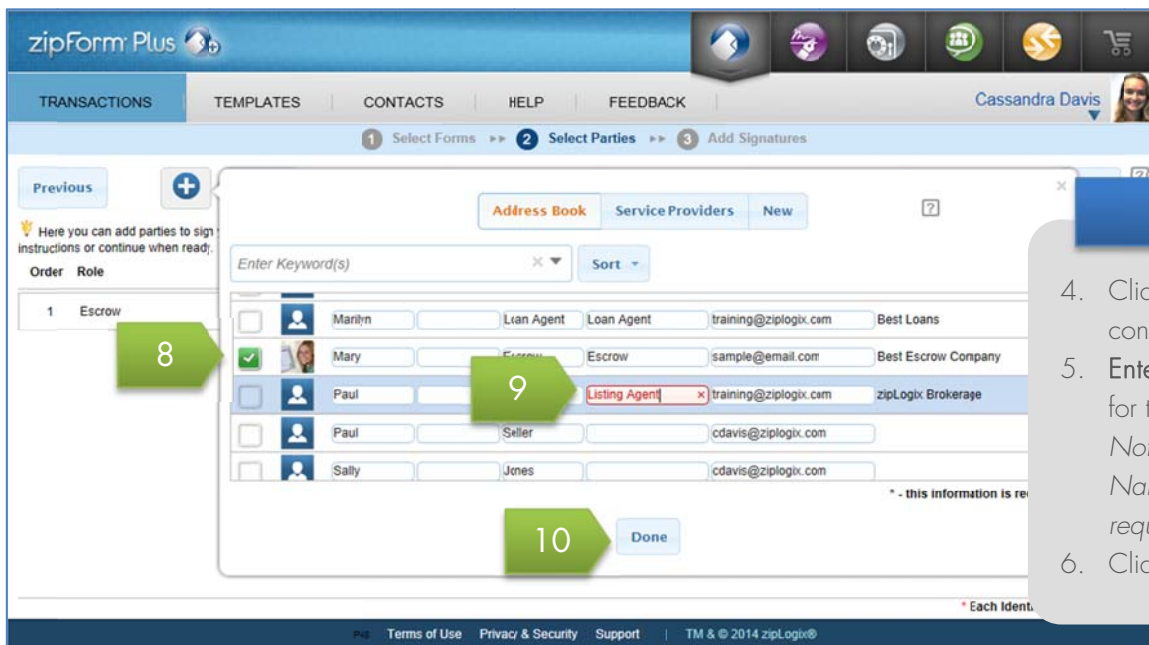


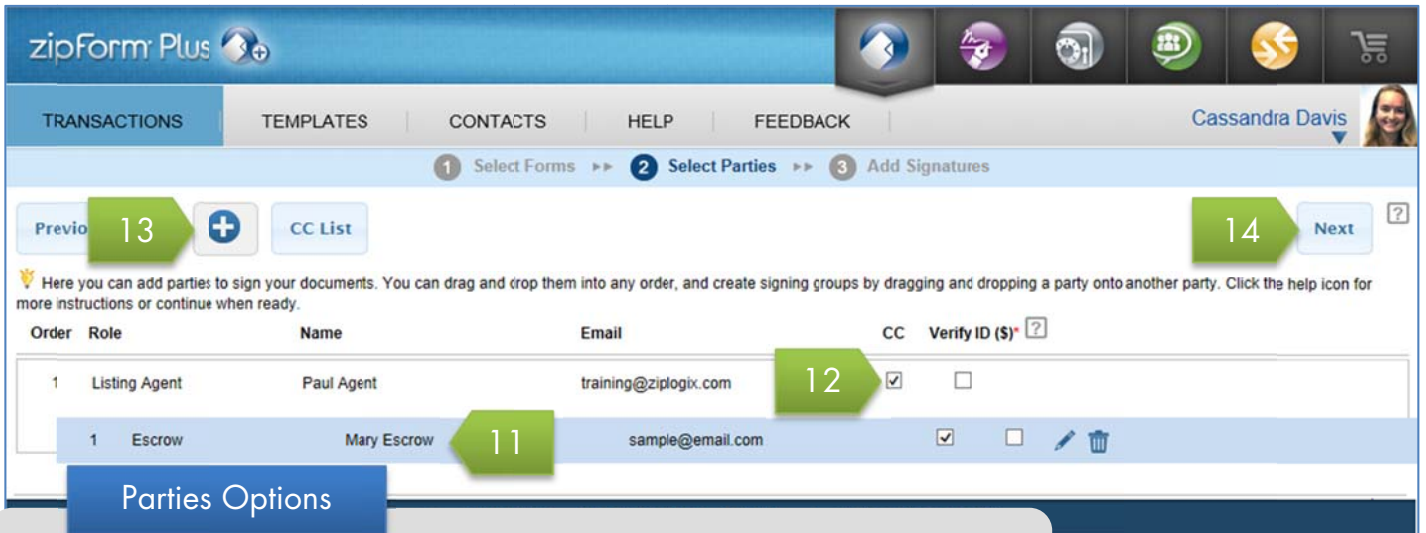
Figure 16 – Browse to add documents for signing



### Add signers

4. Click the **box** next to a contact to add the signer
5. Enter required information for the signer  
*Note: First Name, Last Name, Role and Email are required*
6. Click **Done**

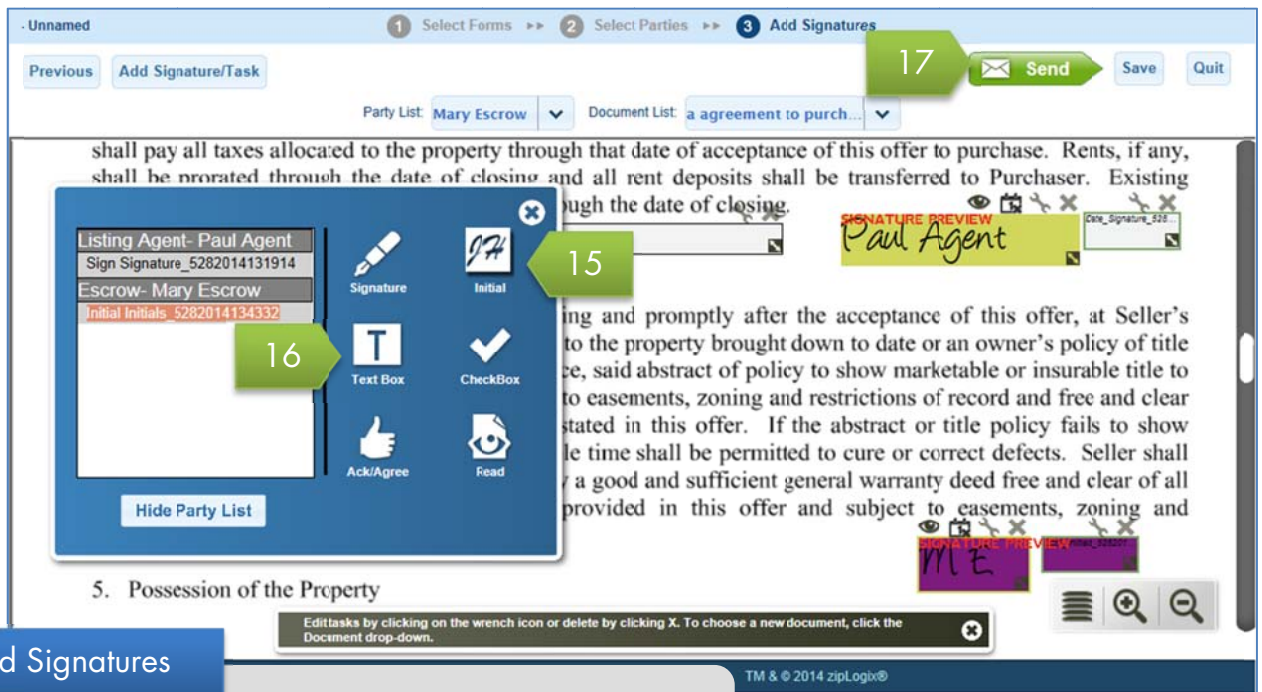
Figure 15 – Select signing parties



### Parties Options

11. Click and drag to arrange signing parties signing order
12. (Optional) Check the CC or Verify ID boxes, if desired
13. Click the (+) to add more signers, or CC List to add emails to the CC List (the list of people who will be emailed a PDF of all signed documents when signing is complete)
14. Click Next

Figure 17 – Select party options



### Add Signatures

15. Click and drag to add an area for someone to click to sign or initial
16. (Optional) Click and drag to add text or check boxes for signers to complete, or drag the Acknowledge/Agree or Read options to the PDF
17. Once you have marked all signing areas on all documents, click Send

Figure 18 – Add signing tasks to the PDF

## What does the signer see?

Signers are able to complete the signing process directly from their email – no special equipment or software is required. Signers are able to sign from a computer or a tablet device. However, they are restricted from signing on smartphones, for your protection, as the smartphone screen may make it difficult to read or understand a contract.

### zipLogix Digital Ink® Signatures email: Your documents are ready to review

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Each signer receives an e-mail with the attached link and follows these steps to begin signing:

1. Clicks the **link** within the zipLogix Digital Ink® email, to begin signing.
2. Read and agrees to the **eSign legal consent**
3. Creates a 6 digit **PIN** (a password with at least 1 letter and 1 number) for signing
4. Select the style for the digital signatures or creates their signature using their mouse (or tablet)
5. Clicks **next**

The document list appears for the signer, listing all documents to be signed. The signer can click **Next** to begin signing, or can double-click on the document that they wish to sign.

### Signing documents:

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1. To sign or initial a document or page, the signer clicks the blue **Click here to sign** button(s)  
*Note:* If any check boxes or text boxes were added by the agent during the preparation of the documents (see: STEP 3 – Add Signatures), then the signer will be able to click to check off check boxes or to type in text boxes
2. Signers can also click the **Next Signature/Task** button at the top of their screen to jump to the next signature or task
3. When all signatures are complete for this document, the signer clicks the green **Finish Signing** button
4. Once the signer clicks the Finish Signing option, the signer is prompted to **commit to their signatures**, and must agree to be bound by their signatures, which will lock in their signatures and automatically time and date stamp any date fields marked in STEP 3 – Add Signatures

If there are additional documents to sign, the signer will be able to double-click the next document on the Document List to continue signing. When signing is complete, a message appears on the screen stating that the signing is complete and they can exit the screen or review the documents.

Once a signer has completed signing, the next signer on the list will be notified that it is their turn to sign documents. All signers will follow the same steps for the signing process.

### zipLogix Digital Ink® signing complete

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All signers receive an email that the procedure is completed and there is a link they can click to return (using their pin) and print a completed copy. Any signers or outside parties on the CC list are sent an email with all signed documents attached.

The agent receives an e-mail notification that the transaction has been completed by all parties and is available for processing.

To retrieve signed documents, use the Check Status/Check Status option (*See Check Status, Page 8*) From this page you can download signed documents, pause the signing process in order to make changes (modify) the unsigned documents or signers who have not yet started signing, or view the history of the signing process.

# Product Requirements

## zipLogix Digital Ink® System Requirements

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- Operating System
  - Windows Vista
  - Windows 7
  - Windows 8
  - MacOS X v10.4.11 and above
- Web Browser
  - Microsoft Internet Explorer, version 9.0 and higher
  - Google Chrome, version 12 and higher. See below on opening PDFs in Chrome
  - Mozilla Firefox, version 3.0 and higher. See below on opening PDFs in Firefox
  - Safari, version 4.1.3 and higher
  - Opera, version 8.0 and higher
  - Note that other browser configurations may work, but have not been specifically tested nor approved for use.
- PDF Viewer
  - For the best experience viewing and printing digitally signed, electronic documents, you must have Adobe Acrobat or Adobe Reader version 9.1 or higher.
  - Note that browser-dependent PDF viewers for Firefox and Chrome, as well as Preview on OS X and iOS may display the signature but will not display the tamper-evident seal. Be sure to view documents in a compliant PDF viewer such as Reader, Acrobat, Nitro Reader, or Fox-It Reader.
- Email
  - An email address and access to the Internet is required.

### zipForm® Plus Minimum System Requirements:

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- Windows XP and above (Windows XP requires Google Chrome 26 and above or Mozilla Firefox 18 and above)
- Mac OSX 10.6 and above
- Internet Explorer 9 and above
- Mozilla Firefox 18 and above
- Safari 5.1.7 and above
- Google Chrome 26 and above
- Minimum Screen Resolution: 1024x768
- 2GB RAM
- PDF viewer that meets current Adobe PDF standards
- Internet Connection

### zipForm® Plus Recommended System Requirements

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- Windows 7 and above
- Mac OSX 10.6 and above
- Internet Explorer 9 and above
- Mozilla Firefox 18 and above
- Safari 5.1.7 and above
- Google Chrome 26 and above
- Recommended Screen Resolution: 1280x800 and above
- 2GB RAM
- PDF viewer that meets current Adobe PDF standards
- Internet Connection

## Guidelines for Uploading Files

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### zipVault®

- Allowed File Types:  
.jpg, .gif, .png, .pdf, .doc, .docx, .xlt, .xls, .bmp, .txt, .csv, .rtf, .zip, .mp3, .wma, .mpg, .flv, .avi, .jpeg, .mp4, .mp3, .ppt, .pub, .m4a, .mov, .vts, .xzfx, .msg, .pst, .docm, .dotx, .dotm, .xlsx, .xslm, .xltx, .xltm, .xlsb, .xlam, .pptx, .pptm, .potx, .potm, .ppam, .ppsx, .psxm, .sldx, .sldm, .thmx
- Allowed File Types for signing:  
.pdf
- Files sent using the email to zipForm® option should be documents. Images are not accepted due to possible confusion with images in email signatures, background, or other email content.
- Maximum size: 15.4 MB

# Product Support Information

Product support is available from our Help Desk to registered zipForm® Plus users between the hours of 8:00 a.m. and 8:00 p.m. Eastern Time Monday through Friday.

## Help Desk:

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<http://support.ziplogix.com>

Fax Number :: 586-790-7582

## Sales:

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Email :: [sales@ziplogix.com](mailto:sales@ziplogix.com)

Fax Number :: 586-790-7582

## Website:

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[www.ziplogix.com](http://www.ziplogix.com)

[www.zipform.com](http://www.zipform.com)

## Mailing Address:

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ziplogix

P.O. Box 130  
Fraser, MI 48026

## Office Location:

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18070 15 Mile Road  
Fraser, MI 48026



[www.ziplogix.com/digitalink](http://www.ziplogix.com/digitalink)

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